



# Report to the Commissioners

## Area IX Agency on Aging, Flathead County

### July 17, 2017

Prepared by Lisa Sheppard, Director

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2015 actuals

FY 2016 annual targets

FY 2016 actuals

FY 2016 actuals as a percentage of annual targets

FY 2016 actuals as a percentage of FY 2015 actuals

FY 2017 actuals to date

FY 2017 annual targets

FY 2017 actuals as a percentage of FY 2017 annual targets

**The general target is 100% for FY 2017, July 1, 2016 – June 30, 2017**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and/or volunteer reporting and some will change during the end of the fiscal year reconciliation process. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

#### Data to note:

- The table was updated to include May data that was unavailable at the time of last month's report.
- Final data for FY 2017 is complete for the following measures:
  - # Receiving Independent Living services: 55% below target – significant variance related to complications with rebuilding client base from previous year suspensions of service due to budget concerns. Note: This number may change when we cross-check with state database.
  - # Receiving Meals on Wheels: exceeded target by 4% and on par with previous year
  - # Seniors Receiving Congregate Meals: exceeded target by 82% and more than doubled those served in FY 2016, primarily because of the increase in meals served at the AOA after moving into the South Campus
  - # Unduplicated riders for Eagle Transit Dial-A-Ride: below target and last year's totals by 20%, even though the number of DAR rides remained relatively flat from FY 2016
  - % Independent Living service recipients at moderate to high risk of institutionalization: slightly above target
  - Per meal cost: 2% above target, primarily due to costs associated with move (excluding capital)
  - % Satisfaction with AOA services: exceeded target by 4% for nutrition services and by 1% for IL services
  - Maximum # of Eagle Transit complaints: 17% below maximum number (so target exceeded)
- Final data for FY 2017 is complete for the following workload indicators:
  - Public outreach/education/media efforts: 3% above target
  - Meals served: 1% above target, 5% above last year's total

- Eagle Transit rides: 9% below target for the year and 5,891 rides below last year's total, a drop of 6.4%. Note: DAR rides were only 3% below target and on par with last year, while city bus rides were 12% off the target and 9% below last year's total.
  - Eagle Transit outreach; exceeded target by 300%
  - Information and assistance contacts: 3% below target, some of which is attributable to the increasing complexity of clients' presenting concerns and some to lagged data entry. Note: June data not already recorded in the state data system by June 30 will be counted for FY 2018.
  - Benefits counseling: This workload indicator was changed in April due to reporting difficulties with the state database. Therefore the data reported for units of service is not complete. We are transitioning from reporting units of service (which is # of contacts) to reporting the # of hours of counseling provided.
  - Ombudsman consults: 6% below target. Consults and cases have continued to increase in complexity requiring additional staff time to resolve.
- The final number of Independent Living units of service provided will not be available until the August report as it is based on billing, which lags an average of 45 days.

## **AOA Administration**

### ***Budget and Contracts***

- The FY 2017 DPHHS contract budget amendment is on the Commissioners' agenda for signature today. The amended budget includes the \$12,123 reduction in state funds for FY 2017, federal funds carried forward from FY 2016, some additional SHIP and MIPPA funds for FY 2017, plus reallocation of some state Older Americans Act funds to Eagle Transit to help support rides for older adults.
- Tara has reviewed the DPHHS FY 2018 contract. It will be scheduled for Commissioner review and signature shortly.

### ***State/Federal/Legislative Issues***

- Governor's Conference on Aging, Sept. 7-8, Red Lion, Kalispell:
  - Staff is coordinating event logistics with DPHHS and has put together a local volunteer committee to help during the conference.
  - We are providing scholarships for area seniors.
  - Lisa will appear on the Aging Horizons TV show this month to promote the conference.
  - We'd like to extend a special invite to Commissioners and Mike to attend the conference, especially the Centenarian Luncheon on the 7<sup>th</sup> and Marvin Kaiser's Age-Friendly Communities presentation on the morning of the 8<sup>th</sup> (with a local Age-Friendly Flathead panel to follow).
- Lisa's meeting with the Area VI AOA director at the end of June to discuss rolling out the new Veterans Direct Home and Community-based Services (VDHCBS) program in the Flathead Valley has been postponed until August. The program supports veterans who need home-based personal care. It is funded by the VA and implemented by Area Agencies on Aging.
- Federally, we continue to engage in advocacy efforts regarding repeal/replace of the Affordable Care Act and the Trump Administration's proposed FY 2018 budget.

### ***Building***

- The following punch list items related to AOA have not been resolved or have not been repaired to our satisfaction: acceptable repair of the reception desk in the lobby (top and drawer), acceptable tile/grout repair in the first floor bathrooms, carpet repair in the AOA suite, wall crack repair in the AOA suite (not painted), repair of ceiling cracks in dining room (not painted), repair of kitchen freezers and repair of locking mechanisms on staff/volunteer door to kitchen storage area and doors to patio. In addition, we continue to monitor the sewer smell on the patio in warm weather.

- The Health Department is working on indoor signage.

### ***AOA Advisory Council***

- The Advisory Council met on 7/13/17. Topics included federal health care legislation, new AOA volunteer opportunities and upcoming events. Welcome to new member, Mike Merchant.
- Several members volunteered to join the Age-Friendly Flathead effort.
- The Council will not meet in August or September because of the Fair and the Governor's Conference. The next meeting will be October 12th.
- The Council voted to begin meeting every other month starting in January 2018.

### ***Other***

- Staff continues to work on a new Continuity of Operations Plan (COOP).

### **Outreach/Education/Media**

Note: Transportation related outreach is noted in the Eagle Transit section below.

#### ***May 2017***

- 5/1/17: KGEZ interview, 11,000
- 5/10/17: BEC outreach at Imagine If library, Kalispell, 15 people
- 5/10/17: meeting with Kalispell City Manager, Doug Russell, regarding Age-Friendly Flathead initiative
- 5/23/17: Medicare 101, 20 attendees
- 5/23/17: Daily Inter Lake article about CMS letter to local Medicare beneficiaries and AOA BEC efforts, "Some seniors could qualify for Medicare cost assistance," 17,000
- Multi-media promotion of Older Americans Picnic
- Multi-media promotion of Medicare 101 classes
- Daily Inter Lake Daybook posting for AOA Advisory Council meeting

#### ***June 2017***

- 6/1/17: Presentation Northwest Coalition Meeting, 12 participants
- 6/5/17: KGEZ interview, 11,000
- 6/9/17: information table at Project Homeless Connect, 300 attendees
- 6/16/17: information table at Older Americans' Picnic, approximately 600 attendees
- 6/17/17: Daily Inter Lake published pictures of the Older Americans' Picnic
- 6/21/17: presentation to the Bigfork Community Center Caregiver Support Group
- 6/27/17: Medicare 101
- AOA June newsletter, 1025
- Multi-media promotion of Older Americans Picnic
- Multi-media promotion of Medicare 101 classes
- AOA June newsletter, distribution of 1025

### **Eagle Transit**

- Montana Department of Transportation (MDT):
  - On 6/23/17, staff met with Rob Stapley (MDT Right of Way Bureau Chief) to review the latest draft of proposed bus shelter rule changes. It appears the majority of our concerns from the previous draft have been addressed. Staff will provide verbal and written testimony at the hearing on August 4<sup>th</sup> in Helena.
  - On 7/6/17, the Planning Committee met to develop a workplan and revise the budget. The Committee anticipates an 18-month process to complete a new 5-year plan. The Committee will facilitate an input session for Eagle Transit staff on July 29<sup>th</sup> at the South Campus.
  - Staff completed and submitted a compliance self-assessment review. We anticipate an onsite visit will occur within the next six weeks.

- Outreach/Education/Media:
  - The KPAX commercial continues to run 100 spots per month on the CW and 18 spots per month on Channel 8 KAJ (CBS morning show and The Price is Right).
  - KGEZ interview and PSAs for new Kalispell to GNP Commuter.
  - Two ads were run for the new Kalispell to Glacier commuter in the Flathead Beacon.
  - Flyer/schedule for the new commuter was widely distributed.
- Operations:
  - A new process to schedule and track maintenance has been developed and is working well. All maintenance is now up-to-date.
- Transportation Advisory Committee (TAC)
  - The TAC meets every other month. The next meeting will be the annual trip to Glacier National Park to view the shuttle service. Commissioners are invited.
- Glacier National Park
  - The new Kalispell to Glacier commuter started on July 1<sup>st</sup> and had approximately 50 riders in the first two weeks.
  - The regular shuttle service also began on July 1<sup>st</sup>. Rides are up 7,296 from this time last year. Projections show seasonal ridership could reach 242,197.
  - We continue to have mechanical difficulties with the Optimas. MDT/GNP will release these buses to us in December. We will most likely send them to auction.

### **Nutrition**

- The daily average of meals served at the South Campus is around 100. The patio is getting a lot of use!
- Education fliers were sent to MOW recipients and all congregate sites on how to exercise safely in the heat.

### **I & R/Assistance/Ombudsman**

- The next Medicare 101 class will be on July 25<sup>th</sup> in the 2<sup>nd</sup> floor conference room at the South Campus.
- The Age-Friendly Flathead Steering Committee met on June 26<sup>th</sup> to learn about the Bozeman initiative and plan next steps. The next meeting will be July 26<sup>th</sup>.
- DPHHS staff will hold an I&A certification training for AOA volunteers August 3-4 at the South Campus. Once trained, volunteers will provide basic resource information to clients over the phone and in the AOA office.
- Our extraordinary volunteer Ruth Pomeroy has “retired” after seven years of providing 20 hours per week of Medicare counseling to Flathead seniors. She will be sorely missed!

### **RSVP**

- Grant update: An additional financial report must be submitted by 7/31/17.

### **Senior Mobile Home Repair**

- The Advisory Board met on 7/11/17. The Board will not meet in August.
- 24 projects are in progress and 2 have been completed in the last month.
- Funding received since last report: nothing to report

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- Lisa met with the Bigfork Community Center Board on 6/30/17 to discuss the status of a potential new site. The Center is now hosting a Caregivers Support Group the first and third Mondays of each month and a knitters’ group on Monday mornings.
- The AOA/Kalispell Senior Center Joint Committee met on 6/7/2017. KSC has a new website: [www.kalispellseniorcenter.com](http://www.kalispellseniorcenter.com)
- The Whitefish Community Center is holding a “Picnic in the Park” fundraiser July 29th.

- AOA is working with all of the Centers to host the Senior Rest Area at the Fair in August. In addition, KSC members have secured cookie and coffee donations.

# July 2017 Report: Performance Measures Tables -June 2017 stats (FY 2017)

100.00%

MEASURE	FY 2015 Actuals	FY 2016 Target	FY 2016 Actuals	FY 2016 % of Target	FY 2016 as % FY 2015	June	Total Last Report	Total/Avg. to Date	FY 2017 Target	% Target
# Receiving Independent Living Services	413	320	447	140%	108%	14	164	178	400	45%
# Receiving Meals on Wheels	459	450	471	105%	103%	16	454	470	450	104%
# Seniors Receiving Congregate Meals	929	820	867	106%	93%	97	1,688	1,785	980	182%
# Eagle Transit DAR Unduplicated Riders	510	450	502	112%	98%	6	395	401	500	80%
# of RSVP Volunteer Hours	42,378	32,653	35,262	108%	83%	N/A	YTD	25,782	32,000	81%
% of Service Recipients at Moderate to High Risk of Institutionalization	89%	85%	94%	111%	106%	89%	88%	89%	88%	101%
Per Meal Cost of Nutrition Services	\$6.13	\$6.50	\$6.30	97%	103%	\$6.62	\$6.63	\$6.62	\$6.50	102%
% Overall Satisfaction with AOA Services from Annual Survey	98%	95%	N = 98%, IL = 95%	100%	100%	N/A	N/A	N=99% IL-96%	95%	100%
Maximum annual number of transportation complaints	24	36	27	75%	113%	2	28	30	36	83%
WORKLOAD INDICATOR	FY 2015 Actuals	FY 2016 Target	FY 2016 Actuals	FY 2016 % of Target	FY 16 as % FY 15	June	Total Last Report	Total/Avg. to Date	FY 2017 Target	% Target
<b>Outreach/Education/Media</b>						June				
Public Outreach/Education/Media Efforts	112	110	153	139%	137%	11	112	123	120	103%
<b>Nutrition</b>						June				
Total Meals	84,152	82,000	78,541	96%	93%	7,302	75,126	82,428	82,000	101%
MOW			49,283	N/A	N/A	4,264	45,431	49,695		
Congregate			29,258	N/A	N/A	3,038	29,695	32,733		
Nutritional Assessments Conducted	1,850	1,270	1,451	114%	78%	266	2158	2,424	1,550	156%
<b>Transportation</b>						June				
Total Ride Count	93,716	94,000	91,196	97%	97%	6,596	78,709	85,305	94,000	91%
Dial-A-Ride Count	29,435	29,000	30,644	106%	104%	2,639	27,386	30,025	31,020	97%
City, Commuter and Other Ride Count	64,281	65,000	60,552	93%	94%	3,957	51,323	55,280	62,980	88%
Eagle Transit Outreach/Special Events	13	10	8	80%	62%	5	35	40	10	400%
<b>Information and Referral/Assistance</b>						June				
Info and Referral/Assistance Contacts	17,942	17,000	19,586	115%	109%	1819	15,704	17,523	18,000	97%
<b>Independent Living</b>						May				35%
Homemaker Units of Service	3,478	2,500	1,616	65%	46%	77	629	706	3,333	21%
Escorted Transportation Units of Service	2,131	2,200	1,548	70%	73%	124	594	718	2,186	33%
Respite Units of Service	2,474	3,000	2,600	87%	105%	75	810	885	3,315	27%
Community Support/Senior Companion Units of Service	1,033	800	1,322	165%	128%	49	938	987	1,090	91%
Personal Care Units of Service	865	675	1,150	170%	133%	10	332	342	465	74%
<b>Benefits Counseling</b>						June				
Medicare Counseling Units of Service	2334	1,900	2,260	119%	97%	186	1091	1,277	2,400	53%
Benefits Counseling Hours of Service						50	550	600	N/A	N/A
<b>Ombudsman</b>						June				
Ombudsman consults/cases opened	546	150	1,454	969%	266%	69	965	1,034	1,100	94%
<b>RSVP</b>						ended March		Final		
Volunteers Recruited/Enrolled	393	320	356	111%	91%	0	YTD Total	342	320	107%
Volunteer Work Stations	72	35	62	177%	86%	0	YTD Total	33	35	94%
RSVP Newsletters Produced/Distributed	4	4	4	100%	100%	0	2	2	4	50%